# TranscriptPad [Part 2] – Select Text, Apply Annotations, Assign Issue Codes, Create Reports

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Apps in Law: TranscriptPad [Part 2]
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TranscriptPad
Part 2

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In Part 1, we covered how to import .TXT transcripts into TranscriptPad, tips for reading through transcripts, and searching the text.

Now in Part 2 we're focusing on how to select text and assign Issue Codes in TranscriptPad, and creating marvelous Reports.

**Selecting Text**

The first step in creating any designation in TranscriptPad is to select text by tapping in the left margin with the blue line numbers.

Let's say you find a Question & Answer exchange that's important and relevant – if this were a printed paper transcript, you would want to highlight it, or underline it, or put a sticky note on it.

But in TranscriptPad, all you have to do is tap the line number of the first line you want to select, then scroll down and tap the LAST line of your text selection. You'll immediately see the "Annotate Designation" box pop up where

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you can:

- Assign an Issue Code
- “Flag” the text
- Highlight the text
- And more…

We’ll come back to this “Annotate Designation” box in a moment …

Your text selections can be on a single page, or they can span multiple pages.

If you only need a single line designation, then just tap the same line twice.

You can actually select text in the reverse – you can tap the LAST line of your text selection FIRST, and then scroll UP to tap the FIRST line of your selection.

If you make a mistake in selecting text, just tap outside of the selection.

## Annotate Designation Popup

Now let’s walk through the Annotate Designation popup which is the beating heart of TranscriptPad – it’s where the work really gets done.

### *Highlight & Underline*

Let’s start with the highlight and underline options since they’re fairly self-explanatory. Both of these annotations really just serve as a nice visual way to direct attention to sections of text.

You get 4 colors each for a highlight or underline – I do wish there were more to choose from, or that I could create custom colors.

If you need to REMOVE a highlight or underline, you’ll need to select the same text again and then tap the circle with the line through it under highlight or underline – that will remove the annotation.

### *Issue Codes*

You can create an Issue Code to assign to your text selection – just tap “Create Issue Code,” give it name, and select a color (you only get 6 choices here). Then tap Done.

The color you select isn’t applied to the text – it’s the color of a vertical line that appears in the left margin to signify an issue code has been applied to that text.

Now you can assign that same Issue Code to other text selections and it’ll be available in the Annotate Designation pop-up after you select some text.

All of the selections for each Issue Code get listed in the left panel, so anytime you need to jump to a section, just pivot down the arrow on an Issue Code and tap on the page & line number that you need. You’ll jump right to the section that you tap …

If you need to change the name or color of an Issue Code, just tap the “Edit” button on the right.

You can also delete an Issue Code altogether, but you'll lose your annotated selections.

*Flags – With & Without Notes*

TranscriptPad also lets you "Flag" selected text, similar to how you'd put a sticky flag or post-it note on an important page in paper.

A Flag can stand by itself, or you can type a note to be associated with a Flag.

I don't really see too much of a point of a Flag WITHOUT a note, as you could just assign an Issue Code, or just highlight the text.

But being able to type a NOTE in a Flag is extremely helpful! Recording your thoughts about a particular section is invaluable so you don't forget those thoughts later. This is the equivalent of writing a note in the margin of a transcript, or writing on a post-it note, … except you can READ these notes (they're not your handwriting), and your notes won't fall off like post-it notes will.

A Flag without a note has an empty flag icon.

A Flag WITH a note has a solid flag icon, and you'll also see a blue dot next to the designation in the list on the left panel.

Tap the Flag icon in the transcript to see your note where you can edit it if you need to.

**Advanced Tip:** You can split up a Flag (or really any annotation). Let's say you have a Flag with a note spanning several lines, but you don't want some of the lines in the middle to be Flagged. Simply select those middle lines, then tap the Red "delete Flag" button in the pop-up. This will effectively "split" the Flagged section in two, but the remaining Flagged lines will RETAIN the Flag with the note!

*Copy & Email*

The last two functions at the bottom of the Annotate Designation pop-up are really useful too.

Tapping "Copy" will copy your text selection to the iPad's clipboard so you can paste it into a document or a note or an existing email draft.

Tapping "Email" will create a new email message on your iPad's Mail app with the subject line pre-populated with the page & line numbers of your selection. And the text of your selection will appear in the body of your message.

**Reports**

All of the work you've done assigning Issue Codes and highlighting text, and flagging sections allll pays off when you tap the magnificent "Reports" button.

The pop-up wizard looks a little intimidating at first, but it's really simple once you break the sections down.

On the left side, you can choose your "Report Type." When you tap a Report Type, you'll get a little description on the right of what's contained in the Report. We'll come back to each Report Type in a moment, but first let's decide what CONTENT we want included in our Report.

Do you want all your Flagged selections included in the Report? With or without notes? What about your text highlights and underlines? Which Issue Codes do you want included in the Report?

You can pick and choose what pieces of information makes the most sense to be included in your Report by simply turning each option off or on.

And based on which Report Type you select, you can determine your "Designation Sort Order."

Sorting your Report by Annotation means the Report will be grouped by annotation, and then list all of the page & line numbers associated with each annotation.

Sorting your Report by Page means the Report is grouped by each page number, and then list all of the annotation on that page.

If you're not sure which one to pick, the good news is that you can always delete a report and start over!

Now let's talk about the different Report Types.

First you have the PDF Reports, and I would say that the **Detail PDF Report** is probably the most popular.

When you tap "Create Report" you'll get a PDF that lists each designation page & line number ALONG with the text of the selection.

Based on what you selected for the content of your Detail PDF Report, you have basically just created a summary of your transcript without any copying or pasting or PRINTING!

Now this PDF can be emailed to a colleague, saved to your case in TranscriptPad, uploaded to Dropbox or OneDrive, opened in PDF Expert, etc. You basically have a PDF summary of your transcript.

Next, let's go to **Summary PDF Report**. It's the same as the Detail PDF Report, except that you don't get the text of your selection – just the page & line numbers of your designations.

The two **Annotated PDF Reports** are basically your entire transcript, but your designations are included with the text of the transcript. There's a helpful "key" for your Issue Codes on the front page. However, if you use more than 6 Issue Codes then it's difficult to tell the Issue Codes apart.

The **Annotated (Full) Report** creates one page per page, and the **Annotated (Mini) Report** creates 4 pages per page.

The **Impeachment Report** is one of the newest features in TranscriptPad and it's really nifty for quickly creating "slides" of your text selections that can be presented in court for impeachment purposes, or really any time that you need nice slides of the text from a transcript.

The Impeachment Report PDF can be printed or emailed, or sent to another app on your iPad like TrialPad so that it be presented on a projector or TV. You can leave it as a PDF, or convert the PDF into images.

The **TXT Reports** offers "Detail" and "Summary" options as well. I don't see these reports used very much, but they do offer a great way to produce plain text versions of your text selections that can be copied into a Word document.

The **Microsoft Excel Report** is amazing, but unfortunately, I find it's often overlooked. The Report creates an Excel spreadsheet with a "Worksheet" or "tab" for each Flag, Highlight, Underline, or Issue Code that you have included in the Report.

You can view a basic version of the Excel Report inside TranscriptPad, but to get the full effect you need to use the Share menu to "Open In" to the free Microsoft Excel app on your iPad.

The last two Report Types are very specialized for any litigation teams that plan to use trial presentation software such as Sanction or TrialDirector at their trial. Both of these trial presentation software applications can show text selections from transcripts, but you have to tell the programs what sections you want to show.

These reports create special files that can imported directly into either Sanction or TrialDirector which makes creating the sections to show so very easy, as well as expediting the process of having to create video clips from any depositions that were recorded.

**Advanced Tip:** you can generate a report from either a single deposition, or for ALL the transcripts in a case. Again, you just need to focus on what level in the case folder that you're at – if you in a single transcript, then your Report will only be on that transcript. If you're at the top level of your case with multiple transcripts, then your Report will cover ALL of those transcripts.

## Sharing and Collaborating

The one major downside I see with TranscriptPad is the fact that it's not easy to collaborate on transcripts. Other applications like TextMap or Case Notebook are server-based, meaning that when one member of the team annotates a transcript, or adds a note, the rest of the team can access the same information and collaborate in real time.

TranscriptPad only lives on a single iPad. Any annotations or notes you make on a transcript stays on your iPad. So how do you collaborate with your team? Here are a few suggestions…

First, you COULD print it all out.

Second, you could email a Report that you create from a transcript (you can email a .TXT file too, but it won't have your annotations).

Third, you can email an entire case folder from the Cases list, but beware this can get BIG quickly. In fact, TranscriptPad asks if you want to include the PDF exhibits since they can get BIG (the .TXT files are tiny). A new mail message is created with an attachment of the case, that can ONLY be opened in TranscriptPad. So you can send this to an associate or colleague that has an iPad and uses TranscriptPad.

Lastly, you can Archive a case which is good for either making a backup copy of your case, or sharing the case folder with a colleague … but this method requires you to use a computer and the iTunes software.

If you want to know more about how lawyers use TranscriptPad, then be sure to listen to my podcast interview with Stephen Embry where he talks specifically how he uses the app in his litigation practice.

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**DISCLOSURE:** Several years ago, Lit Software provided a free download code for TranscriptPad that I have used in many CLE presentations and I used the app for this review.